City of Lafayette Staff Report

For:	Lafayette City Council
By:	Jennifer Russell, Parks, Trails & Recreation Director
Date Written:	February 17, 2009
Meeting Date:	February 23, 2009
Subject:	**Senior Needs Assessment Task Force Status Report**

Introduction

At the request of the Lafayette City Council, Task Force Representatives will update the city council on the SNATF Progress to date and request support to move forward.
Attached is the proposal submitted by BW Research, the Consultant selected by the Task Force. The document does contain a sample timeline on page 16 which would be adjusted to reflect a final project report presentation date around October 2009. On the following page 17, the research project option "n=400, 12 min" would cost $29,750.00 and is our option of choice. The Task Force has been exploring funding sources outside the community and will continue to do so as well as solicit support from potential local resources.

Recommendation

Receive and File.

Proposal to Conduct a Community Needs Assessment of Older Adults

Presented to the City of Lafayette

November 11, 2008

[bw]
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COVER LETTER

BW Research Partnership, Inc. (BW Research) is excited about the opportunity to work with the City of Lafayette on its community needs assessment of older residents. BW Research is a full-service research firm specializing in public opinion research for government agencies, including cities, counties, and special districts. We are a women-owned small business with offices in Carlsbad and San José, California.

BW Research understands that the City of Lafayette is interested in conducting a comprehensive community needs assessment of seniors to understand the needs, attitudes, opinions, and behaviors regarding education, financial counseling, housing, medical and nutritional needs, referral assistance, recreation, safety, socialization, and transportation. BW Research has developed a comprehensive project plan that utilizes a combination of data gathering methods to capture both in-depth narrative data (community workshops and executive interviews) and statistically reliable data (telephone or mail survey) to meet the City's research objectives.

BW Research is uniquely qualified to conduct the City of Lafayette's community needs assessment of older residents. Our depth of experience covers all the key areas necessary for a successful project:

- Experience conducting **projects focused on older adults**, as well as those focused on transportation, housing, education, parks and recreation, and healthcare topics; and
- Extensive experience conducting **customized primary research projects** for public sector clients using a variety of data gathering techniques, such as telephone, mail, intercept, and Internet surveys, community workshops, and executive interviews;
- Proven experience developing **actionable conclusions and recommendations** that serve as a catalyst for making programmatic changes and allocating scarce resources.

BW Research has developed a project plan that is **cost effective** while ensuring **representative** and **reliable** data. BW Research purposely chose not to include a senior expert from academia as part of the project team because of the associated cost implications. Instead, BW Research will leverage its experience conducting related research studies as well as the City's Senior Needs Assessment Task Force's expertise of older adults and the Lafayette community.

BW Research's depth of analysis will provide the City of Lafayette with all the information crucial to understanding the needs, attitudes, opinions, and behaviors of seniors; identifying the extent to which the current and anticipated needs of seniors are being met; and developing short-term and long-term strategies for programs, services, and facilities for older adults.

BW Research co-founders, Josh Williams and Jaime Lynn Barrah will serve as co-project managers for this study. The City of Lafayette will get the advantage of a well-rounded project management team, with both Ms. Barrah, who specializes in senior research studies, and Mr. Williams, who specializes in city research, education, and transportation studies, working together to meet all of the City's research objectives.

BW Research has a thorough understanding of the goals of the study and direct experience conducting similar studies for other agencies. We are excited to put our experience and passion for research to work for the City of Lafayette. If you have any questions or would like to discuss the proposal further, please do not hesitate to contact me directly at 760-730-9329 or jwilliams@bwresearch.com. We look forward to hearing from you.

Regards,

Josh Williams, President and Principal Researcher

STATEMENT OF QUALIFICATION

Careful consideration of research methodology and a well executed sampling plan are the key components to any reliable and valid research study. The principals at BW Research are experienced methodologists committed to developing and implementing the most effective research plan based on your research objectives.

Although BW Research is a relatively new firm (founded in 2006), the founders have been in the research industry for over nine years each and have extensive experience working with public agencies throughout the western United States. Before starting their own firm, Mr. Williams was the research director and Ms. Barrah the associate research director for another California-based market research firm. Collectively, they have managed over 300 research studies, with many focused on seniors, education, transportation, housing, parks and recreation, and healthcare as well as research of targeted, special populations (depending on the research objectives of the study).

Recent **senior needs assessment projects** include those for the Town of Danville, City of Henderson, and Spring Hill Senior Living. Recent **education-related projects** include those for the Carlsbad City Library, Carlsbad Unified School District, Bay Region Center or Excellence, Silicon Valley Center of Excellence, Los Rios Community College District, and San Jose State University.

Recent **transportation research** experience includes projects for the Metropolitan Transportation Commission (MTC), Metrolink, and Valley Economic Development Corporation. Recent **parks and recreation** experience includes studies for the City of Portland, City of San Jose, and Big Bear Valley Park and Recreation District. Recent **resident research** projects include those for the City of Carlsbad, City of San Jacinto, City of Solana Beach, and the City of Pasadena, to name a few.

BW Research has all the resources needed for a successful project. With the firm's owners as the project managers for the study, the City of Lafayette can be assured that it is getting a highly skilled and experienced project team that will be committed to the project's success.

FIRM PHILOSOPHY

BW Research was created out of a belief that the highest quality research products and consulting services are a result of:

- A research process that is focused on providing the most reliable results using the most effective methodologies;
- Creating a partnership of professionals, not employees, who have a vested interest in the quality of our products and services; and
- A commitment to research that builds communities, supports workers and consumers, and provides a clear direction for decision makers.

BW Research is a firm that strives to create the highest quality research, the most fulfilling work experience for ourselves and our associates, and exceed client expectations to provide unparalleled client satisfaction.

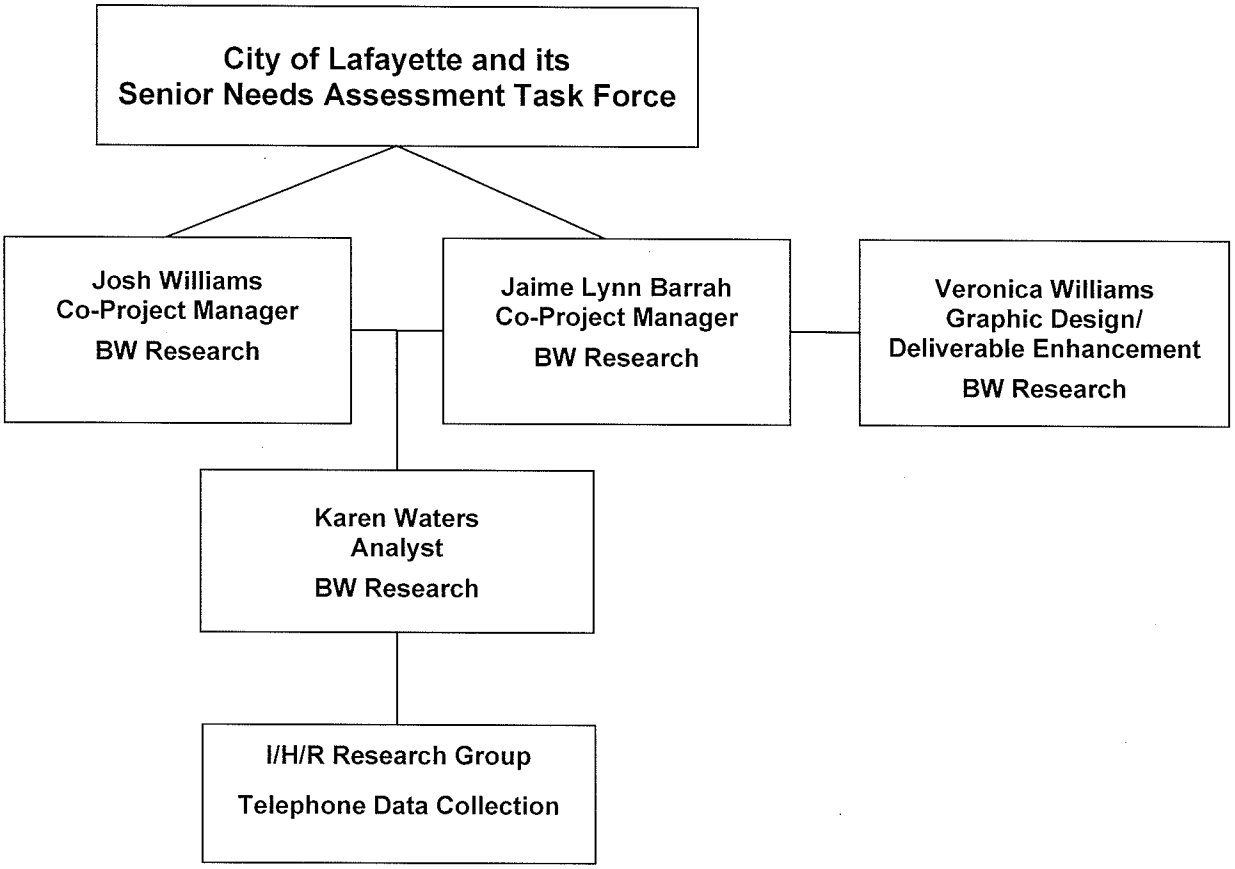
STAFFING PLAN

The project team will include Josh Williams, Jaime Lynn Barrah, Veronica Williams, and Karen Waters from BW Research. If the telephone survey option is selected, BW Research will utilize I/H/R Research Group as the subconsultant for telephone data collection. BW Research has worked extensively with I/H/R, teaming on approximately 50 survey research projects.

The strength of our team is each member's depth of knowledge and experience conducting similar projects. The City of Lafayette will also get the advantage of a well-rounded project management team, with both Ms. Barrah, who specializes in senior research studies, and Mr. Williams, who specializes in city, education, transportation, and parks and recreation research studies and working with community leaders and stakeholders, working together to meet all of the City's research objectives. The entire project team is committed to the project and will be available for the duration.

Along with our organizational chart for the project, we have presented background information on each team member, including their role on the project and their related experience.

ORGANIZATIONAL CHART



RESUMES

Co-Project Manager – Josh Williams

As President and Principal Researcher at BW Research, Mr. Williams is responsible for the firm's city-resident research studies, transportation studies, executive interviewing projects, voter research, and workforce and economic development research projects. Mr. Williams' work has included numerous research projects for public agencies, many of which focused on special populations of interest, including senior needs assessment studies, strategic planning projects, parks and recreation studies, and corporate market research.

Mr. Williams will be the co-project manager for Lafayette, serving as the day-to-day contact for city representatives. Mr. Williams will also be responsible for strategic oversight of the project, sampling and survey design, executive interviews, community workshops, data interpretation, and presentation of results.

Mr. Williams recent senior needs assessment projects include the Town of Danville, City of Henderson, and Spring Hill Senior Living. Mr. Williams has extensive experience conducting resident research, education, parks and recreation, and transportation-related research studies. Recent examples included projects for the Central Valley Center of Excellence, Carlsbad City Library, Los Angeles Community College District, Bay Region Center or Excellence, Silicon Valley Center of Excellence, San Jose State University, Metropolitan Transportation Commission, Metrolink, City of Carlsbad, City of Solana Beach, City of San Jose, City of Citrus Heights, City of Pasadena, and the City of West Hollywood.

Mr. Williams is well-versed in a wide array of sophisticated quantitative methods to analyze data and, more importantly, provide clear directions for clients based on research findings. Mr. Williams received his B.A. in International Economics from George Washington University and his M.A. in Economics from California State University, Long Beach. He also occasionally teaches economics at Palomar College and serves as Vice President of the Executive Board for the non-profit agency, North County Community Services.

Co-Project Manager – Jaime Lynn Barrah

As Co-Founder and Principal Researcher at BW Research, Jaime Lynn Barrah is responsible for the firm's planning projects and works with Mr. Williams to manage and direct the day to day operations of the firm. Ms. Barrah prides herself on providing clients with the information needed to answer questions, assist planning efforts, and improve their communities through attentive customer service and high quality research.

Ms. Barrah focused on senior needs and aging workforce issues in her graduate school dissertation and has a publication in an academic journal related to her research. Ms. Barrah has continued investigating and measuring the needs of seniors in applied research by managing senior needs assessment projects for the Town of Danville and the City of Henderson (Nevada).

In addition to her experience and passion for senior-related research, Ms. Barrah has extensive experience conducting resident research, education, parks, and recreation, and transportation research studies. Recent examples included projects for the Metropolitan Transportation Commission, Metrolink, the City of Carlsbad, City of San Jose, City of Citrus Heights, Bay Region Center of Excellence, and Carlsbad Unified School District.

For the Lafayette study, Ms. Barrah will serve as co-project manager, working with Mr. Williams on the survey design, executive interviews, community workshops, and data analysis and interpretation. Ms. Barrah will be responsible for ensuring the highest quality research deliverables on the project, including preparation of the final report.

Prior to founding BW Research Partnership, Ms. Barrah worked as the Associate Research Director at the same west coast-based research firm where Mr. Williams was Director. While there, Ms. Barrah directly managed over 100 research projects during her six-year tenure, including design, management, analysis, and presentation of results.

Ms. Barrah's work includes projects for cities, counties, transportation agencies, libraries, school districts, parks and recreation districts, storm water and sewer districts, universities, community colleges, workforce development agencies, financial institutions, corporations, and political consultants.

Ms. Barrah is also an experienced institutional researcher who spent a number of years working in the California community college system. A published author, Ms. Barrah received her B.A. in

Psychology from the University of California, Riverside and her M.S. in Industrial and Organizational Psychology from California State University, San Bernardino.

Graphic Designer: Veronica Williams

As one of the founding members of BW Research, Veronica Williams is responsible for the firm's innovative technical solutions and graphic design services. Prior to BW Research, Ms. Williams worked as a consultant/contractor to develop and manage interactive web applications, database applications, and websites for various corporations and organizations.

As part of this project, Veronica Williams will design the layout of the notification flyer for the community workshops, any hand-out exercises for the community workshops, the mail survey layout (if utilized), and work with the team on graphic design for the final report and presentation.

Ms. Williams' work includes projects for global corporations, community agencies, government and transportation agencies, cities, health-care, and private and public companies.

Ms. Williams was also involved with Danville's senior needs assessment project, providing graphic design services for the community workshops and project report.

Research Analyst – Karen Waters

As a Research Associate for BW Research, Karen Waters is an instrumental part of the firm's public opinion and economic and workforce development research. Ms. Waters is actively involved in developing and improving the firm's research deliverables and analytical approach to our projects.

Ms. Waters will serve as the lead analyst on the project, responsible for reviewing population demographics, managing data collection, reviewing and processing the data, and assisting with preparation of the final report and PowerPoint presentation.

Prior to joining BW Research, Ms. Waters worked as an analyst at the same California-based research agency as Ms. Barrah and Mr. Williams and was also a research advisor for a publishing group and a trade association in the United Kingdom. While in the United States, she has been the lead analyst for over 50 survey and secondary research projects and excels in developing research deliverables that exceed client's expectations.

Ms. Waters is experienced in a wide array of analytical techniques and developing research deliverables that provide clients with a clear strategic direction based on research findings. Ms. Waters received her B.A. in Economics and Social Studies from the University of Manchester, in the United Kingdom and a Post-Graduate Diploma in Social Research and Evaluation from the University of Huddersfield also in the United Kingdom.

RELEVANT PROJECTS AND REFERENCES

Below is a list of references and related projects managed by Josh Williams and Jaime Lynn Barrah. Please let us know if you need help getting in contact with any of the references below.

SENIOR NEEDS STUDIES

TOWN OF DANVILLE, CALIFORNIA

Project: Senior Parks and Recreation Needs Assessment (2007)

Project Managers: Marcia Somers, Assistant City Manager, (925) 314-3334 and Michelle Lacy, Recreation Services Manager, (925) 314-3377

Project Summary: BW Research Partnership completed a comprehensive senior needs assessment for the Town of Danville in 2007. The main research objective of the project was to understand the needs, opinions, attitudes, and behaviors of Danville's senior community to ensure that adequate resources are in place as the Town's senior population continues to grow. The study was comprised of an assessment of existing services, two community workshops with residents, a Town council workshop, a statistically representative telephone survey of residents, and executive interviews with providers of services to seniors within the community.

BW Research has included a copy of the Town of Danville research report in the proposal packet for the City of Lafayette. Although the study was focused specifically on parks and recreation, it serves as an example of BW Research's quality of work and deliverables.

CITY OF HENDERSON, NEVADA

Project: Senior Needs Assessment (2006)

Project Manager: Cindy Herman, Public Information Manager, (702) 267-2051

Project Summary: For the City of Henderson's senior community needs assessment, the City was interested in assessing the need for a new Senior Center in the City. In addition to multiple community workshops, 400 senior recreation users and 600 non-users completed a telephone interview. The study explored residents' use, satisfaction with existing services, barriers to use among those who have not utilized services, preferred location for a new center, and user and non-user preferences for activities, programs, amenities, and facilities for senior recreation, health, and counseling services. Jaime Barrah presented the results in multiple public formats and the findings are being put to use by city staff as they plan a new Senior Center.

SPRINGHILL SENIOR LIVING, PALMDALE CALIFORNIA

Project: Voter Assessment for a New Senior Living Facility (2008)

Project Manager: Andy Plant, Project Manager, (858) 456-1233

Project Summary: This study measured voter support for senior needs within the City of Palmdale. Voters provided feedback on senior needs from transportation and healthcare issues as well as recreation and housing preferences at a new facility. The research evaluated which assets were most important at a new independent and assisted-living facility and which regional priorities should be considered in the design of the new buildings. This study also considered the needs and priorities of caregivers and those individuals that could retire in the next three to five years.

TRANSPORTATION STUDIES

METROPOLITAN TRANSPORTATION COMMISSION (MTC)

Projects: Spare the Air Campaign Research (2007), Regional Transportation Plan (2007 & 2008)
Project Manager: Joe Curley, Public Information Officer, (510) 817-5847

Project Summary: BW Research recently completed three projects for MTC. The first was for the 2007 Spare the Air Campaign, which evaluated transportation patterns of residents throughout the Bay Area and the effectiveness of the campaign in encouraging residents to use public transportation. The two other studies were used to support MTC's 2035 Regional Transportation Plan. One was a survey of 1,800 residents and the other of 3,600 residents in the nine county Bay Area. The project included assessing current transportation behavior and whether residents in the region would accept new policies, in the areas of transportation and housing, aimed at reducing the number of individuals that drive alone and the resulting impacts on the environment.

METROLINK

Projects: Potential Rider Study, Rider Retention Research, Hispanic Potential Rider Study (2005 - 2006), and Multiple Rider Panel Studies (2004 – 2006)
Project Manager: Henning Eichler, Research Director, (213) 452-0212

Project Summary: While at their past employer, Josh Williams and Jaime Lynn Barrah served as project managers for all Metrolink projects, many of which were focused on special populations, including potential riders, Hispanic riders, rider panel members, and users of specific services. In 2008, BW Research was selected as an on-call research firm for future Metrolink projects.

EDUCATION-RELATED STUDIES

LOS ANGELES/ ORANGE COUNTY REGIONAL CONSORTIUM

Project: Public Sector Industry Assessment (2007)
Contact: Lyla Eddington, Director, (818) 599-4212

Project Summary: Josh Williams has managed and completed multiple industry cluster studies for the Consortium. A recent study examined workforce development opportunities and challenges in the public sector. The study included a focus on aging workforce issues and how the high percentage of anticipated retirements will impact the industry and what regional community colleges can do help organizations train workers to fill those positions and transfer their institutional knowledge before retirement.

CARLSBAD CITY LIBRARY, CALIFORNIA

Project: Resident and Customer Research (2008)
Contact: Cheryl Mast, Management Analyst, (760) 602-2014 and Heather Pizzuto, Library Director, (760) 602-2056

Project Summary: BW Research recently completed a comprehensive resident and customer research project with the Carlsbad City Library. The goal of the project was to assess use, satisfaction, and awareness of the library's programs (including lifelong learning), services, and amenities. In addition to analysis at the overall level, BW Research examined perceptions among resident and customer sub-groups, including those 55 years and older, to evaluate how their perceptions and needs differed from younger residents and customers. The project involved a representative telephone survey of 600 residents using a random digit methodology as well as intercept surveys with close to 900 library customers. BW Research was able to more than double the number of completed intercept interviews that were completed by their previous

consulting firm while implementing a sampling plan that accounted for, and responded to, relatively higher non-response from specific sub-populations.

LOS RIOS COMMUNITY COLLEGE DISTRICT

Project: Public Sector Industry Assessment (2007)

Project Manager: Theresa Milan, (916) 563-3221

Project Summary: In 2007, BW Research worked on an assessment of the public sector in the greater Sacramento Area. The project included secondary research, employer surveys, and executive interviews to examine employee skills, experience, retention, loyalty, and retirement issues as well as current and projected industry needs. The research is being used to help the District develop programs and services to help public sector organizations find qualified and skilled workers to replace retiring employees as well as train current employees to move up within their organization and fill those positions.

PARKS AND RECREATION STUDIES

CITY OF SAN JOSÉ, CALIFORNIA

Project: Parks, Recreation, and Neighborhood Services Resident Research (Current)

Project Manager: Rafael Gomez, Project Manager, (408) 793-5571

Project Summary: BW Research is in the process of completing two resident opinion research projects for the City of San José's Department of Parks, Recreation and Neighborhood Services. The Greenprint Study was comprised of 1,000 telephone surveys and examined residents' overall parks and recreation priorities for the City as well as assessed residents' current use and satisfaction with parks and outdoor recreational areas, trails and walkways, and indoor recreational activities. Six hundred residents were interviewed for the second survey, which focused on residents' current use, satisfaction, and priorities for San Jose's sport fields and recreation facilities. Both surveys were offered in English, Spanish, and Vietnamese. BW Research developed separate comprehensive reports for each project and will also be presenting the findings in the near future.

CITY OF PORTLAND, OREGON

Project: Park and Recreation Needs Assessment (2005 and Current)

Project Manager: David Yamashita, (503) 823-5120

Project Summary: The Portland Parks and Recreation Bureau was in the process of developing a strategic plan that would determine where the Bureau would focus its planning and development resources over the next five and ten years. The research for this study included a large-scale telephone survey (n=1,600) of residents and multiple focus groups with specific user groups. This study included a market segmentation of residents based on current and potential parks and recreation usage. This analysis included a demographic and psychographic profile of the different resident segments to assist the City in understanding the different types of groups that are currently using park and recreation resources as well as the other residents in the City who were not using park and recreation resources within the City and why.

BW Research is currently working with the City of Portland to perform a 2008 parks and recreation market segmentation analysis.

PROJECT APPROACH (PROPRIETARY)

BW Research has developed a comprehensive approach to best meet the needs of the City of Lafayette. We have broken the project down into four phases: review of background research and population demographics (Phase 1), community workshops and executive interviews (Phase 2), statistically reliable survey (Phase 3), and data analysis, report writing, and presentation of results (Phase 4).

Throughout each project task, BW Research will be in communication with the City of Lafayette and its Senior Needs Assessment Task Force (SNATF), providing updates and working together to ensure that each phase of the project effectively meets the research objectives for the study.

PHASE 1: REVIEW OF BACKGROUND RESEARCH AND POPULATION DEMOGRAPHICS

During Phase 1 of the project, BW Research will meet with City of Lafayette representatives and the SNATF in-person to go over the research objectives for the study and discuss the content for the community workshops, executive interviews, and survey.

BW Research will also review any previous research conducted by the City of Lafayette to help inform the current study. Even if the City does not have any previous research, BW Research will draw upon experience working with other government agencies on similar projects as well as review comparable senior needs assessments conducted by other research entities to provide strategic advice to the City of Lafayette.

As part of Phase 1, BW Research will also gather and analyze available population demographics for the City of Lafayette to develop the sampling plan for the survey in Phase 3. Since current population demographics are not available for the City from the Census, BW Research will develop current population estimates for the senior community based on available information and the data the City has obtained from DemographicsNow. BW Research has already begun reviewing population demographics for the City as part of this proposal to help inform our recommended sampling plan (detailed on page 11).

PHASE 2: COMMUNITY WORKSHOPS AND EXECUTIVE INTERVIEWS

During Phase 2, BW Research will draw on its past experience and the information provided by the City and SNATF to develop the content and format of the community workshops and the discussion guide for the executive interviews.

Community Workshops

Based on our experience conducting similar community workshops, we recommend that the City sponsor the community workshops and hold them at a City facility. Holding the workshops in-house keeps the project costs down for the City and also legitimizes to participants that this is a public input process that will be put to direct use by the City. We recommend that one workshop be held in the afternoon, from 2:00 to 4:00, and the second workshop be held the same day from 6:00 to 8:00 to ensure that residents with senior parents, senior residents who have daytime commitments, and those that are still working have an opportunity to participate.

BW Research will work with the City to determine the agenda, who should speak at the event, and the best places to publicize the workshops. Veronica Williams, BW Research co-founder and graphic designer will work with the City to design the flyer to publicize the event. BW Research will also create exercises to utilize during the workshop, such as having attendees rate the importance of different senior programs, services, and facilities under consideration by the City.

Executive Interviews

As part of Phase 2, BW Research will personally conduct ten one-on-one interviews with senior service providers and other stakeholders within the community. Using the discussion guide as an outline, the one-on-one interviews permit an in-depth discussion of topic areas. The format also allows us to explore topics brought up by the respondent in an open-ended format. BW Research will work with the City to compile a list of the best stakeholders to include in the sample for the executive interviews (e.g., senior service providers, informed residents, senior members of public boards, etc.). We will then contact each person and schedule a time to interview them over the phone. Each executive interview is estimated to take 15 and 30 minutes to complete, depending on the respondent's input and time available.

All ten executive interviews can be conducted during Phase 2, or half can be conducted before the survey and the other half after the survey. Executive interviews conducted after survey data have been collected are used to gather input and test the feasibility of project conclusions, recommendations, and next steps. BW Research will work with the City and its SNATF and implement the executive interviews at the times deemed most appropriate based on the overall research objectives of the study.

PHASE 3: STATISTICALLY RELIABLE SURVEY

The information gathered in Phases 1 and 2 of the study will help inform the content for the survey instrument in Phase 3.

Questionnaire Design

Through an iterative process, BW Research will work with the City and its SNATF to develop a survey instrument that meets all the research objectives of the study. The founders of BW Research are experts in designing surveys and writing unbiased questions that are easily understood by respondents, yet provide the maximum level of detail to our clients.

Sampling Plan

BW Research has extensive experience developing statistically representative samples based on the research objectives and target universe of the study. For this study, there are two main options to serve as the foundation for the sampling of the senior community: a random sample of all residents or a listed sample of residents known to be 55 years and older.

Although the specific details of sample development differ for a mail and telephone survey, we will keep the discussion broad to help the City understand the advantages and disadvantages of each method. Ideally, the sample would be developed from a random selection of all phone numbers or addresses held by Lafayette residents to give everyone an equal opportunity to be included. We would then either mail out or call residents in the sample and ask that the survey be completed by someone in the household 55 years or older. Although this approach gives all residents 55 years and older the same probability of being included in the study, it costs a lot more money than using a listed sample (more than twice as much). The reason for the increased cost is because approximately 29 percent of residents are 55 years or older and there is no way of knowing ahead of time which households will qualify.

The other option is to utilize a listed sample of residents known to be 55 years and older. One potential disadvantage to this approach is the possibility of excluding a certain segment of the population (for example, those who choose to have an unlisted number). However, for this study, we have the advantage of focusing on an older segment of the population that has a high probability of being listed. In addition, residents 55 years of age are also much more likely to be registered voters than younger residents. By purchasing a listed sample of registered voters (containing phone numbers and addresses) and supplementing the voter sample with another

listed sample from known public sources (such as the white pages), we estimate that our listed sample will include contact information for between 90 and 95 percent[1] of the City's residents 55 years and older. This estimate is based on our projection of Lafayette's senior population (from DemographicsNow and the US Census) and the information provided to us by our voter sample and listed sample providers. We are confident that this methodology will provide a statistically reliable sample of residents while maximizing the City's research dollars.

Data Collection

For Phase 3, BW Research recommends that the City utilize either a mail or telephone survey of residents 55 years and older. There are pros and cons associated with each technique and we have provided a brief overview of each in this section.

Overall, the advantages of a mail survey are that:

- it is often cheaper to administer than phone surveys;
- it can be completed at the respondents' leisure;
- it can display visual cues such as pictures or maps.

Overall, the advantages of a telephone survey are that:

- the time needed for data collection is much shorter than for mail;
- it typically has a higher response and cooperation rate than mail;
- we can minimize self-selection biases by monitoring the demographics of respondents who complete the survey and implement techniques to ensure representativeness of the various demographic groups of older residents in the City (which is much more difficult to do with mail);
- we can administer a more advanced survey instrument, with skip patterns and randomization to minimize position bias.

Based on the City's desire to collect data from a representative sample of the community 55 years and older, utilizing a method that yields the highest response rate, we feel a telephone survey would best meet the City's objectives. However, we have provided costs for both options in the Cost of Proposed Services section starting on page 17. BW Research would be happy to discuss the methodological nuances of each approach during the selection interview or kick-off meeting for the project.

Based on the total number of residents 55 years and older in the City and our experience conducting similar studies, we recommend that the City conduct either 400 or 500 total interviews, with an average interview length of 12 or 15-minutes. Although both sample sizes yield comparable margins of error at the overall level (maximum margin of error of 4.2% for 500 interviews and 4.8% for 400 interviews), the larger sample size provides greater reliability and a lower margin of error when the data is examined by subgroup, such as age group, gender, geographic area, length of residence, activity and health level, and retirement status.

As an optional addition to this section, BW Research would also propose that the City consider including a sample of residents 45 to 54 years of age in the study to better allow the City to predict the needs of the senior community over the next ten years as well as gather quantitative feedback from residents with senior parents. This addition does not have cost implications

[1] BW Research will provide the City with a more precise estimate after a thorough review of senior population estimates during the initial phase of the project.

because the City would still net the same number of total interviews (400 or 500), with a portion of those being among residents 45 to 54 years of age.

PHASE 4: DATA ANALYSIS, REPORT WRITING, AND PRESENTATION OF RESULTS

In Phase 4, BW Research will integrate the results of the previous three phases to provide the City of Lafayette with actionable conclusions and recommendations.

Data Processing and Analysis

The team at BW Research is comprised of experts in the field with regard to data processing and analysis. We hold ourselves to extremely high quality control standards and evaluate each project individually to find the best way to present the data. BW Research will check all data for accuracy and completeness prior to conducting any analysis. If the mail survey option is chosen, BW Research will also code and enter the data into a statistical application. If the telephone survey is chosen, we have the added advantage of implementing quality control methods during data collection. For example, we will check the data frequently since it will already be coded and in an electronic format and provided to us daily for review from the data collection facility.

Collecting demographic information at the end of the survey from participants will allow us the ability to look at crosstabulations of the data for every survey question to assess whether differences exist among specific subgroups of senior residents. Although BW Research will examine the data at the overall level to provide overall project conclusions and recommendations, one of our core strengths is our ability to examine the data by subgroups. Our depth of analysis will provide the City of Lafayette with all the information crucial to understanding the needs, attitudes, opinions, and behaviors of seniors; identifying the extent to which the current and anticipated needs of seniors are being met; and developing short-term and long-term strategies for programs, services, and facilities for older adults.

Topline Report and Meeting

Within one week of completing data collection, BW Research will provide the City with a preliminary topline report of the results, which is a question-by-question summary of the survey results. BW Research will also meet with the City in-person or by phone to discuss the initial findings and any specific requests for the comprehensive written report.

Comprehensive Written Report of Findings

The team at BW Research strives to provide our clients with reliable research and actionable results. We spend considerable time interpreting the data and synthesizing the research findings into meaningful conclusions and recommendations based on the research objectives of the study. We believe it is our job to connect the dots for the readers and the City of Lafayette representatives who need to take action from the results of the study.

BW Research is committed to producing research products that:

- Are concise and focused on applying the research. It is much more difficult to produce a concise 40 page report than a bulky 100 page report that lacks direction;
- Are produced for the appropriate audience;
- Are visually appealing and easy to view on the web;
- Empower city staff and officials to have ongoing use of their data.

BW Research prides itself on selecting the most appropriate methods to display the results of the study. We choose the best combination of narrative text, graphical displays, and tables to

highlight the results of the study. BW Research strives to only include information in our reports that illustrates a point or shows a finding relevant to the study's objectives. We will not include crosstabulation tables in a report just to bulk up the report with tables. We only include charts and tables that tell a story or where a specific relationship relevant to the research objectives emerged.

Each of BW Research's reports are provided to our clients in Word and PDF formats and include a stand alone Executive Summary that can be easily disseminated to the general public.

Presentation of Results

The team at BW Research is skilled at presenting research findings to a variety of audiences. Accompanied by PowerPoint slides, the presentation will summarize the highlights of the study and focus on the resulting conclusions and recommendations in an interactive format that allows for discussion.

SUMMARY SCOPE OF SERVICES

Below is a summary of the scope of services for the project:

- Conference calls and meetings with the City and its SNATF, as needed, to discuss the research objectives for the study, background materials, workshop format, discussion guide for interviews, questionnaire design, and related topics. BW Research with also meet with the SNATF either in-person or by phone to provide updates and receive feedback throughout the project, as needed;
- Working with the City to organize two community workshops to gather narrative input to help inform the survey content;
- Drafting and refining a discussion guide to conduct approximately ten one-on-one interviews with senior service providers and other stakeholders within the senior community;
- Developing a statistically reliable sampling plan for the telephone or mail survey;
- Purchasing, cleaning, clustering, and stratifying a sample of residents 55 years and older;
    - If chosen by the City, including a sub-group of residents 45 to 54 years of age in the sample;
- Drafting and refining a questionnaire of approximately 12 to 15 minutes that can be used as either a mail or telephone survey;
- If the mail survey option is chosen, the scope will include:
    - Designing the mail survey layout;
    - Developing a sampling plan to mail out enough surveys such that 400 or 500 surveys are retuned (based on the sample size chosen);
    - Printing and assembling the mail surveys for distribution or providing the City with the information to assemble and distribute the surveys;
    - Monitoring the return of the surveys to determine whether reminder letters should be mailed; and

  - Key punching the data into a statistical application according to strict quality control standards.

- If the telephone option is chosen, the scope will include:
  - Programming and pre-testing the survey for efficient and accurate data collection;
  - Monitoring data collection to ensure the sample of residents interviewed is representative of the population of residents 55 years and older;
  - Conducting 400 or 500 telephone interviews with senior residents according to strict quality control standards.
- Regardless of the survey method chosen, BW Research will be responsible for:
  - Compiling and analyzing the data collected from all phases of the project and preparing an initial question-by-question summary of the results;
  - Developing a comprehensive written report of findings, including a stand alone Executive Summary with key findings, conclusions, and recommendations;
  - Producing a complete set of cross-tabulation tables;
  - Preparing an oral presentation of findings accompanied by PowerPoint slides;
  - Providing the City with the data;
  - Serving as an on-going resource for the City as it plans to implement the project recommendations.

SCHEDULE

Below is our estimated timeline for the project. Based on the information provided in the Request for Proposals, BW Research estimates it will take up to four months to complete the entire project. The four month estimate includes up to one week of review time by the City for each deliverable. If needed, the project timeline could be completed in closer to three months by including shorter review times.

For illustration purposes only, we have used a project start date of Monday, January 5, 2009. In the timeline below, BW Research has included the tasks and time required to conduct a telephone survey of residents. If the mail survey option is chosen, we estimate that the time needed for data collection will increase by approximately two weeks.

Project Task	Estimated Dates
Phase 1: Review of Background Research and Population Demographics	
Project Kick-Off Meeting	January 5
Review of Background Research, Population Demographics	January 6 - 9
Phase 2: Community Workshops and Executive Interviews	
Develop Content and Format of Community Workshops	January 10 - 12
Review by City of Lafayette	January 13 - 19
Revisions, if needed, to Finalize Content and Format	January 20
Community Workshops (two held on same day)	January 21 or 22
Work with City to Develop List for Executive Interviews	January 19 - 23
Develop Discussion Guide for Executive Interviews	January 23 - 28
City Review of Discussion Guide	January 29 - Feb. 3
Revisions, if needed, to Finalize Discussion Guide	February 4
Conduct 10 Executive Interviews with Stakeholders	February 5 - 17
Phase 3: Statistically Reliable Survey	
Develop Sampling Plan for the Survey	February 12 - 17
Evaluate Findings from Phases 1 and 2 to Inform Survey Content	February 18 - 20
Develop Survey Draft	February 23 - 27
City Review of Draft Survey	March 2 - 5
Revisions, if needed, to Finalize Survey Content	March 6
Purchase, Clean, Cluster, and Stratify Listed Sample of Residents	March 9 - 12
Program and Pre-test the Survey	March 11 - 12
Revisions, if needed, based on Pre-Test	March 13
Conduct 400 or 500 Telephone Interviews with Senior Residents	March 14 - 23
Phase 4: Data Analysis, Report Writing, and Presentation of Results	
Compile, Process, and Analyze the Data	March 24 - 26
Prepare an Initial Question-by-Question Summary of the Survey Results	March 27
Meeting with City to Discuss Findings	March 30 or 31
Develop a Comprehensive Written Report of Findings	March 31 - April 14
City Review of Report	April 15 - 22
Revisions, if needed, to Finalize Report	April 23
Prepare a Presentation of Findings Accompanied by PowerPoint Slides	April 24
City Review of Presentation	April 27 - 30
Revisions, if needed, to Finalize Presentation Content	April 30
Presentation of Results	Anytime
Provide the City with the Data	Anytime
Remain Available to Answer Questions Related to the Research	Ongoing

COST OF PROPOSED SERVICES

Below is our fixed-fee to complete the entire project. BW Research has developed a project plan that is **cost effective** while ensuring a **representative** sample with reliable data. BW Research has provided the City with the costs associated with conducting either a telephone (Option 1) or mail survey (Option 2) of varying lengths (i.e., 12 or 15-minute survey) and sample sizes (i.e., 400 or 500). BW Research has included the costs and travel associated with five in-person meetings with the City (e.g., kickoff meeting, community workshops, update and feedback meetings, presentations, etc.). As long as the project parameters do not change from those proposed (e.g., number of interviews, length of survey, method of data collection, number of in-person meetings, etc.), the project costs will not change even if the team spends more hours on the project than originally estimated.

OPTION 1: COMMUNITY WORKSHOPS, EXECUTIVE INTERVIEWS, & TELEPHONE SURVEY

Sample Size **Length of Phone Survey**	**n=400** **12 min.**	**n=400** **15 min.**	**n=500** **12 min.**	**n=500** **15 min.**	**Hours**
Review Research & Demographics	$1,450	$1,450	$1,450	$1,450	15.00
Planning & Moderating Community Workshops*	$4,950	$4,950	$4,950	$4,950	60.00
Planning & Implementing Executive Interviews	$2,450	$2,450	$2,450	$2,450	30.00
Listed Sample Research & Development	$1,250	$1,250	$1,560	$1,560	10.00
Survey Training, Pre-Testing & Monitoring	$725	$725	$725	$725	25.00
Telephone Interviewing	$7,700	$9,100	$9,625	$11,375	220.00
Survey Programming	$750	$975	$750	$975	15.00
Data Processing	$1,725	$1,875	$1,725	$1,875	30.00
Research & Analysis	$8,250	$8,750	$8,250	$8,750	100.00
Miscellaneous Expenses	$500	$500	$500	$500	-
Project Total	$ 29,750	$ 32,025	$ 31,985	$ 34,610	505.00

* Costs assume that the City will host the community workshops, providing printing materials and refreshments.

OPTION 2: COMMUNITY WORKSHOPS, EXECUTIVE INTERVIEWS, & MAIL SURVEY

Please note that the costs associated with conducting a mail survey would be reduced by $6,250 to $9,740 (depending on the option chosen) if the City handles the printing and postage of the surveys and reminder post cards internally.

Sample Size **Length of Mail Survey**	**n=400** **4 pages**	**n=400** **6 pages**	**n=500** **4 pages**	**n=500** **6 pages**	**Hours**
Review Research & Demographics	$1,450	$1,450	$1,450	$1,450	15.00
Planning & Moderating Community Workshops*	$4,950	$4,950	$4,950	$4,950	60.00
Planning & Implementing Executive Interviews	$2,450	$2,450	$2,450	$2,450	30.00
Listed Sample Research & Development	$1,250	$1,250	$1,560	$1,560	10.00
Printing and Postage for Mail Survey**	$4,800	$6,400	$6,000	$8,000	60.00
Printing and Postage for Reminder Post Cards	$1,450	$1,450	$1,740	$1,740	20.00
Keypunching and Coding	$840	$1,260	$1,050	$1,575	110.00
Data Processing	$1,725	$1,875	$1,725	$1,875	30.00
Research & Analysis	$8,250	$8,750	$8,250	$8,750	100.00
Miscellaneous Expenses	$500	$500	$500	$500	-
Project Total	$ 27,665	$ 30,335	$ 29,675	$ 32,850	435.00

* Costs assume that the City will host the community workshops, providing printing materials and refreshments.

** Assuming a 10% to 20% response rate, which is typical with mail surveys.